- Coke to quen
- Cable clients
- The Nashville Network adds country flavor to cable
- Industry responds to cross-ownership issue

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CableVision™

The news and features weekly of the cable television industry

February 1, 1982

Making tracks: A new generation of networks

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On the cover

Playboy had its debut last Friday on Escapade, beginning the eventual transformation to The Playboy Channel. The service, despite resistance from some operators, moves ahead with "cautious optimism." Playboy/Escapade is presently carried on Comstar D-2, transponder 4V. On the cover of *CableVision* this week are comedian Andy Kaufman and September 1981 Playmate Susan Smith, weighing in before their televised wrestling match. Photo courtesy of Playboy Productions, Inc.

Leading the week

Pages 13-16

On the lookout

Finding the right agency keeps cable clients on a bumpy ride. More and more services are changing agencies.

Movies and a smile

Coca-Cola's recent acquisition of Columbia Pictures opens more sources of revenue to the motion picture company that could be used to expand into cable.

Few surprises

The comments are in on the FCC's move to ease the cross-ownership restriction. Most of the respondents walked the party line.

Country cable

The long-rumored formation of the Nashville Network finally became a reality last week when Group W Satellite Communications and NLT Corporation, through its Opryland Productions division, announced plans to produce the network. The Nashville Network will be an advertiser-supported satellite-delivered country music channel. **Page 22.**

Cable stats

Arbitron's recently released *Network Cable Report* has given the cable industry its first viewership study of eight pay and basic satellite services, including HBO, Showtime, WTBS, Christian Broadcast Network and four others. **Page 26.**

Not a sleeper

With superstation WOR boasting a record 300 percent increase in 1981, some of the credit for the success has to go to its common carrier, Eastern Microwave. In fact, WOR has done much for Eastern's growth and future plans. **Page 51.**

An Opryland Productions cameraman gets in position for a shot during the broadcast of a country music special from the Grand Ole Opry House. The famous country music center will be available for productions to be run on the Nashville Network.

TAKE A LOOK AT TBN

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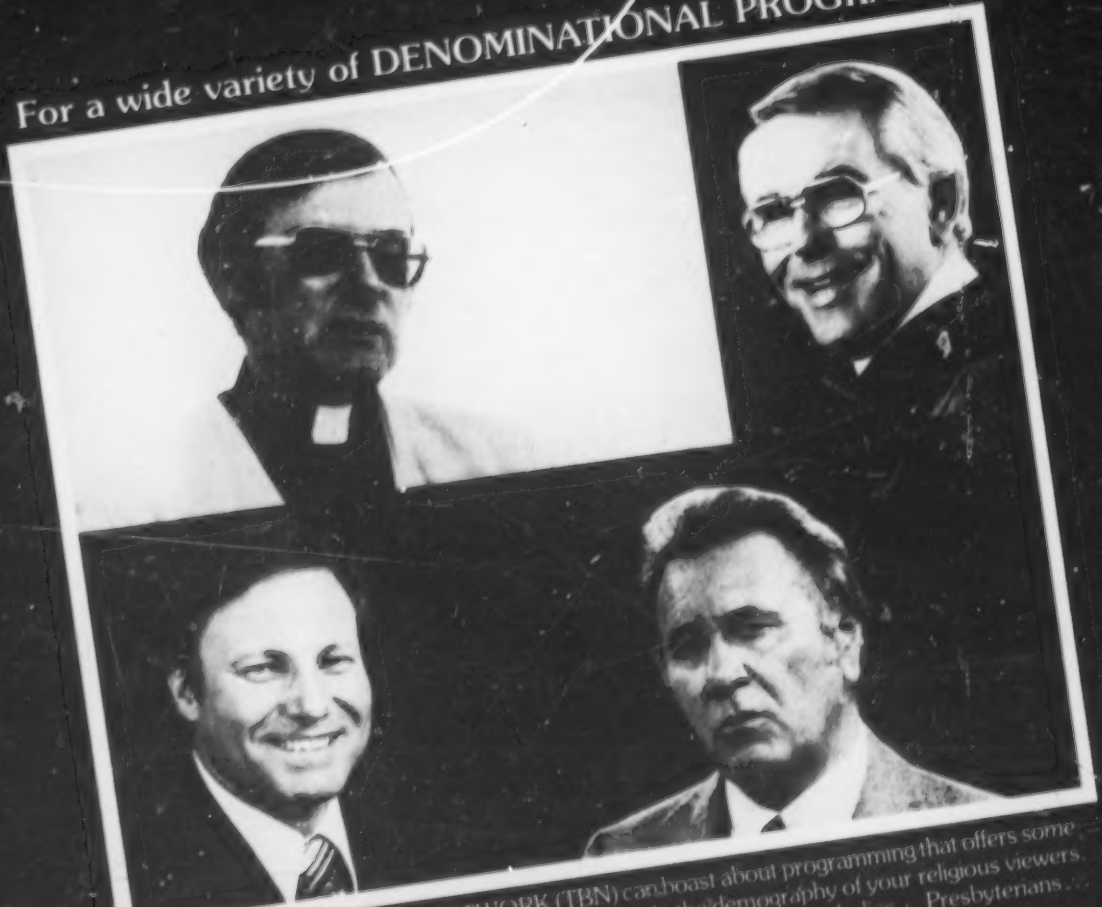

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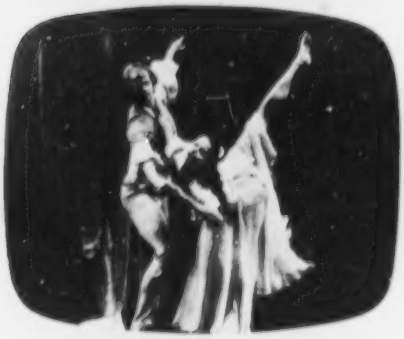

This Week: **Programming**

- Emerging pay networks make their mark, p. 4
- Channel abundance alters viewer habits, p. 16
- Senate television debate continues, p.21

CableVision™

A weekly feature supplement

Vol. 1 No. 3

The four dimensions of SPN

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SATELLITE SYNDICATED SYSTEMS INCORPORATED P.O. BOX 45684 TULSA, OK 74145 918 481-0881

February 1, 1982

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Cumulative results

Arbitron's "Network Cable Report" draws several different reactions from ad agencies

NEW YORK—The Arbitron Company's *Network Cable Report*, the cable industry's first viewership study of eight pay and basic satellite programming services, is meeting with mixed reviews among several advertising agencies which bought the research.

The study, which was released January 14, used aided recall telephone sampling of homes which could receive a given service. Several agencies are not satisfied with telephone sampling in video research, especially if recall is assisted. While most of the agencies contacted by *CableVision* said they were not satisfied with the methodology, they did note that information contained in the study was new and useful.

"It's a start," said Ron Thomas, media research director for McCaffrey and McCall. "They do have some individual program data which we didn't have before. The methodology leaves much to be desired, but it's a handle."

Betsy Frank, associate media research director for Dancer Fitzgerald Sample, Inc., said, "I find it a valuable tool for making some comparative evaluations, but I'm certainly not going to base any audience projections on it." She added, "I don't think we're at the point in cable research where we can rule out any methodology."

Gene Huber, a media researcher for Doyle Dane Bernbach, Inc., said his agency supports the Arbitron effort, but he noted, "we would favor the meter as the best tool for measuring household ratings."

A cable specialist at one of the "superagencies," who would not give his name, sharply criticized the study's methodology and contended that the viewership levels it indicates are 50 percent to 200 percent inflated. He maintained that his comparison of Arbitron's numbers with those generated by the Nielsen Television Index concerning viewership of WTBS showed a difference approximating 60 percent, with Arbitron's numbers higher. He said his agency does not encourage telephone sampling in broadcast research and he decried the use of aided recall, which he said nearly always generates inflated numbers.

Pierre Megroz, Arbitron's marketing director, pointed out that the study was based on a relatively large sample of 3,500 telephone calls. He called the methodology "an accepted way of trying to get pieces of information from people who may have trouble remembering." Megroz added, "This was our first shot at trying to give a relative positioning of one cable-originated service to another, and it's a pretty definitive piece of research." He also noted that 45 major advertisers and agencies have purchased the study.

The report does provide some insight into the viewing habits of the cable service. As might be expected, HBO and Showtime were the most heavily watched of the services surveyed. HBO emerged as the most watched, according to the weekly cume ratings among adults 18-plus with Showtime, WTBS and CNN following.

The two movie services had cume ratings which were substantially higher than WTBS and the advertiser-supported networks during all time periods. In prime time, both HBO and Showtime had cumes consistently in the 20's and 30's, even reaching 40 in some cases, while TBS and the other basic networks had high cumes of 14 to 15. And during the early and late fringe hours, HBO and Showtime had cumes that were substantially higher than all other services, although viewership was smaller for all services during those periods.

There was a marked difference between viewership during the prime-time hours and other parts of the day. ESPN, for example, which showed cumes of two, three and four during the day, obtained cumes of ten to 12 at night. Showtime dramatically increased its viewership during prime time, jumping from a cume of six for a 10 a.m. movie showing to a 28 cume for its 8 p.m. movie. The only exception was CNN, which received cumes of eight and nine for its weekday morning newscasts, similar to the ratings it received for news during prime time.

The size of the cable audience drops sharply in the late evening. Only HBO and Showtime had audiences after 11 p.m. with cumes ranging from ten to 29, while other services' dropped to one, two and three.

Of the advertiser-supported networks, CNN has the largest audience, according to the report, receiving a cume of 40, compared with 32 for ESPN and a 28 for USA.

These networks, however, did not have nearly the audience that WTBS showed. Arbitron's report revealed that WTBS was much stronger than all the services throughout the day. The superstation's movies and old syndicated shows such as *Leave it to Beaver* and *Gomer Pyle* garnered higher cumes than much of the original cable programming. Its weekday cume for a 6 p.m. showing of *Gomer Pyle*, for example, received a ten and 11 while USA's *Calliope*, and CNN news had cumes of three and six.

Movies, sports and syndicated programs, according to the report, are what cable audiences are watching. Those networks which offer such fare would seem to be the favorites of the cable viewers, with audiences much larger than networks attempting to do more original programming.

—Karen Bloom, William Gloede

Weekly cume ratings

This chart lists Arbitron's weekly cume ratings of eight satellite-delivered program services.

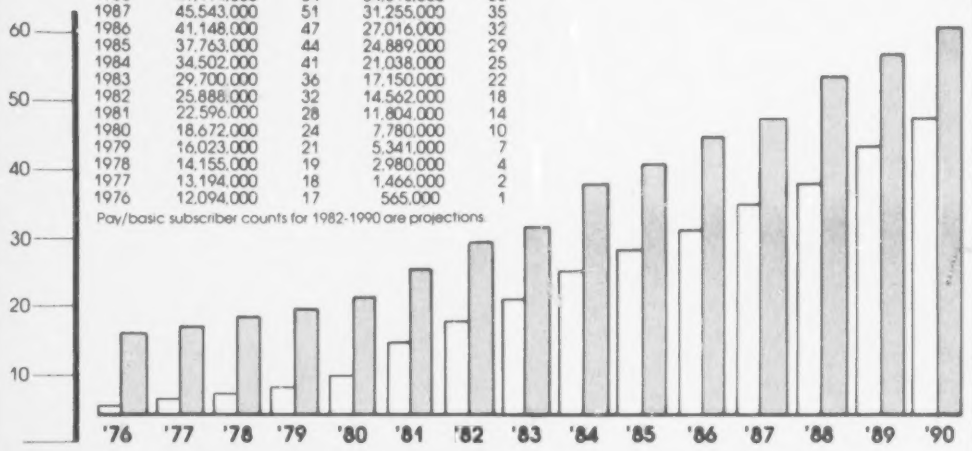
	ADULTS 18+	MEN 18+	WOMEN 18+	ADULTS 18-34	ADULTS 25-34
CNN	57	61	53	55	55
CBN	30	26	33	24	28
ESPN	48	61	36	53	49
HBO	91	92	90	94	93
SHOW	87	89	86	93	90
SPN	35	34	35	39	35
USA	42	48	36	47	42
WTBS	68	72	64	74	69

Cable stats

Pay/basic cable growth

Year	Basic Subscribers	% of TVHHs	Pay Subscribers	% of TVHHs
1990	57,812,000	61	43,596,000	46
1989	53,882,000	58	39,018,000	42
1988	49,194,000	54	34,618,000	38
1987	45,543,000	51	31,255,000	35
1986	41,148,000	47	27,016,000	32
1985	37,763,000	44	24,889,000	29
1984	34,502,000	41	21,038,000	25
1983	29,700,000	36	17,150,000	22
1982	25,888,000	32	14,562,000	18
1981	22,596,000	28	11,804,000	14
1980	18,672,000	24	7,780,000	10
1979	16,023,000	21	5,341,000	7
1978	14,155,000	19	2,980,000	4
1977	13,194,000	18	1,466,000	2
1976	12,094,000	17	565,000	1

Pay/basic subscriber counts for 1982-1990 are projections.



Cable barometer

Television households (TVHH) ... 80,700,000

Homes passed by cable (HP) 41,574,977

Percent of TVHH passed by cable 51.52%

Basic cable subscribers 22,596,000

Percent of TVHH with basic cable :. 28.00%

Percent of HP with basic cable .. 54.35%

Pay cable subscribers 11,804,000

Percent of TVHH with pay cable 14.62%

Percent of HP with pay cable 28.39%

Percent of basic subs with pay cable 52.24%

Film product comparison

Film	Networks					Distributor
A Night Full of Rain					C	Warner Bros.
Airplane	(HBO)	(ST)	TMC*	(HTN)		Paramount
All Night Long	HBO		TMC			Universal
All Screwed Up	HBO					New Line Cinema
All That Jazz	(HBO)	(ST)	TMC*			20th Century-Fox
Altered States	HBO	ST	(TMC)			Warner Bros.
The Amazing Adventures of Joe 90		ST*				ITC
Animal Crackers					C	Universal
Apocalypse Now	(HBO)	(ST)	TMC			United Artists (UA)
The Apple			TMC*			Swank
Ask Any Girl		ST*			(C)	MGM
The Asphalt Jungle					C	MGM
The Awakening		ST	(TMC)			Warner Bros.
Back Roads	(HBO)	ST*	TMC*			CBS
Bananas					C*	UA
Barnaby and Me		ST*				Simcom
The Battle of Algiers					C*	World Northal
The Black Hole	HBO		TMC	HTN		Disney/Buena Vista
The Black Stallion	(HBO)	(ST)	TMC*	(HTN)		UA
Blow-Up		ST				MGM
Bon Voyage, Charlie Brown	(HBO)	ST*	TMC*	(HTN)		Paramount
Borderline	HBO					AFD
Breaker Morant	HBO*	ST*	(TMC)			New World
Bronco Billy	HBO		(TMC)	HTN*		Warner Bros.
Caddyshack	(HBO)	ST*	(TMC)			Warner Bros.
Carny	HBO	(ST)	(TMC)			Lorimar
Cat and the Canary					C*	Universal
The Changeling					C	Chessman Park
Cheech and Chong's Next Movie	HBO*					Universal
Charlie Chan and the Curse of the Dragon Queen	HBO					American Comm.
Cleopatra Jones					C	Warner Bros.
The Competition	HBO	ST	TMC			Columbia
Day for Night					C*	Warner Bros.
Days of Fury		ST			C*	Picturemedia
Death Car on the Freeway					C*	HBO
Diary of a Teenage Hitchhiker					C	HBO
The Dogs of War			TMC			UA
Dona Flor and Her Two Husbands		ST*	(TMC)			Columbia
Dressed To Kill			TMC*		(C)	Filmways
Duncan's World					C*	Best Film and Video
The Elephant Man	HBO*	ST*	(TMC)	HTN*		Paramount
Elvis			TMC	(HTN)		Worldvision
Escape from Alcatraz	HBO	ST		HTN*		Paramount

Film	Networks					Distributor
Everything You've Always Wanted To Know About Sex But Were Afraid To Ask			(TMC)		C	UA
The Evictors	HBO		(TMC)			Filmways
Eyes of a Stranger	HBO					Warner Bros.
Fatso	(HBO)	ST*	TMC			20th Century-Fox
The First Deadly Sin					C	First Deadly Sin Co.
The First Family		ST	(TMC)			Warner Bros.
Five Fingers of Death					C	Warner Bros.
Fort Apache, the Bronx	HBO					HBO
Friday the 13th	HBO*	(ST)	(TMC)			Paramount
The Frisco Kid					C*	Warner Bros.
From Hell to Victory	(HBO)		(TMC)	HTN		Worldvision
The Funhouse	HBO		TMC			Universal
Galaxina		ST	(TMC)			Crown International
Games Girls Play					C	Simcom
Happy Birthday, Gemini			TMC		(C)	UA
Hawk the Slayer		ST*			(C)	ITC
The Hellstrom Chronicles					C	HBO
Holy Terror	HBO					Lorimar
Home Movies			TMC			SMA Entertainment
Honeysuckle Rose	HBO*					Warner Bros.
Hopscotch	(HBO)	ST	(TMC)			Viacom
Hot T-Shirts		ST				Swank
The House of the Seven Hawks					C*	MGM
The Howling			(TMC)		C	Wescom
The Idolmaker	HBO				(C)	UA
Improper Channels	HBO*		(TMC)	HTN		Crown International
The Incredible Shrinking Woman	HBO*	ST	(TMC)			Universal
Inglorious Bastards	HBO					Alive Entertainment
The Jazz Singer	HBO*					EMI/AFD
Journey Back to Oz		ST*				Columbia
King Solomon's Mines		ST*			(C)	MGM
Klondike Fever					C*	HBO
La Cage Aux Folles II			TMC			UA
The Lady Vanishes				HTN*	(C)	Rank
The Last Hunt		ST				MGM
Libel		(ST)			C*	MGM
The Loved One		ST				MGM
Lolita		ST				MGM
Mahogany			TMC			Paramount
The Man Who Saw Tomorrow	HBO		TMC			Warner Bros.
Massacre at Central High			(TMC)		C	Viacom
Mean Streets			TMC			Warner Bros.
Melvin and Howard		ST	TMC*		C*	Universal
Mister Buddwing					C	MGM

Cable stats

Film	Networks					Distributor
Modern Romance	HBO		TMC			Columbia
Mogambo	(HBO)	ST				MGM
Motel Hell			TMC		(C)	UA
My Bloody Valentine			TMC			Paramount
My Bodyguard	HBO*	(ST)	(TMC)	(HTN)	(C)	20th Century-Fox
My Brilliant Career		(ST)	(TMC)	HTN		Analysis
The Night Porter					C*	Joseph E. Levine
Nijinsky			TMC			Paramount
North by Northwest		ST				MGM
Oh, God! Book II			(TMC)	(HTN)	C	Warner Bros.
On the Town		ST*			(C)	MGM
One Trick Pony		ST	TMC			Warner Bros.
The Other Side of the Mountain, Part II					C	Universal
Papillon	HBO*					Lorimar
The Password is Courage					C	MGM
Performance					C*	Warner Bros.
Phobia	(HBO)	ST			C	Paramount
The Pinchliffe Grand Prix	HBO*		(TMC)			OGC
Popeye	HBO*	ST	TMC	HTN		Paramount
Portnoy's Complaint					C*	Warner Bros.
Power Play	HBO*					Magnum Intl.
Raging Bull	HBO	ST	TMC			UA
Resurrection	HBO*	(ST)		(HTN)	(C)	Universal
The Return	HBO*		TMC			G.F.M. Ltd.
Return Engagement					C	HBO
The Return of a Man Called Horse			TMC			UA
Rockshow		ST			C	Miramax
Salem's Lot: The Movie		ST	(TMC)			Warner Bros.
Savage Weekend		ST				Swank
Sayonara					C	Samuel Goldwyn Co.
Scanners	HBO*					Avco Embassy
Scarface					C*	Universal
Seems Like Old Times	(HBO)	(ST)	TMC*	(HTN)		Columbia
Seven Women					C	MGM
Shaolin Hand Luck			TMC			World Northal
The Shining		ST*	(TMC)			Warner Bros.
The Shogun Warrior-Grandizer		ST				Blum Group
Shoot the Piano Player					C	Janus
Shoot the Sun Down					C	Gold Key
Sidney Sheldon's Bloodline	HBO*					Paramount
Simon	HBO	(ST)	(TMC)			Warner Bros.
Smokey and the Bandit II		ST	(TMC)	(HTN)		Universal
Snowball Express	(HBO)	ST	(TMC)	HTN		Disney/Buena Vista
Sounder, Part II					C	HBO
Sphinx	HBO		TMC			Warner Bros.
Stories from a Flying Trunk					C	HBO
The Stud		ST*				Brent Walker
Superdome			(TMC)		C*	HBO
Sweet Sugar		ST*				Swank
Tess			TMC		C	Columbia
The Tenth Month	HBO					HBO
This is Elvis	HBO		TMC			Warner Bros.
Thunderbirds in Outer Space		ST				ITC
Thunderbirds to the Rescue		(ST)			C*	ITC
Tribute	HBO					Kudos Films
Tribute to a Bad Man		ST				MGM
Trilogy	HBO	(ST)				Viacom
Two Weeks in Another Town		ST				MGM
Up River		ST	(TMC)			Gold Key
Urban Cowboy	(HBO)		(TMC)	HTN*		Paramount
Viva Las Vegas			TMC			MGM
The Way We Were	HBO	ST	TMC			Columbia
The Wild Child					C	UA
Which Way is Up?					C	Universal
The World's Greatest Athlete	(HBO)			HTN*		Disney/Buena Vista
Zulu Dawn	HBO*					Zulu Dawn Company

■ **Cable Network Legend**
HBO—Home Box Office
ST—Showtime
TMC—The Movie Channel
HTN—Home Theater Network
C—Cinemax

■ Networks in parentheses indicate carriage in September, October, November, December and/or January.

■ An asterisk following a network indicates the film is a carry-over from September, October, November, December and/or January.

■ In total, 153 films appear on the February schedules of HBO, Showtime, The Movie Channel, Home Theater Network and Cinemax. Of those titles during the last six months (September-December 1981, January 1982), one title ("My Bodyguard") has appeared on all five networks, eight titles have appeared on four networks, 26 on three and 39 on two networks. Seventy-nine films are unduplicated.

■ The motion picture distributor to pay cable with the most titles featured this month is Warner Brothers with 23, followed by MGM with 18 (same as last month). Universal, Paramount and United Artists chipped in 12 films apiece.

■ Robert DeNiro's Oscar-winning role in "Raging Bull" takes center ring this month on the program guide covers of Showtime, The Movie Channel and Cinemax. Showtime also placed Scott Baio and "Gemini" in the ring, with Cinemax accommodating "Tess," "Ft. Apache, the Bronx" (HBO's cover movie this month) and Simon and Garfunkel's Central Park concert last fall. Leave it to Home Theater Network to come up with a different drummer on the program guide (January-February). Robin Williams as Popeye.

Top 20 cable MSOs

Rank	Multiple System Operator	Subscribers
1.	American Television and Communications	1,750,000
2.	Teleprompter/Westinghouse	1,639,990
3.	Tele-Communications, Inc.	1,277,000 (3/81)
4.	Cox Cable Communications	1,098,663
5.	Warner Amex Cable Communications, Inc.	850,000
5.	Storer Cable Communications	850,000
7.	Times Mirror	667,497
8.	Newhouse Broadcasting*	528,981 (9/81)
9.	Viacom Cablevision**	526,004
10.	UA-Columbia Cablevision	496,121
11.	United Cable Television	455,018
12.	Continental Cablevision	449,547
13.	Sammons Communications	443,708
14.	TeleCable Corporation	295,500
15.	Cablecom General/Cap. Cities	289,739
16.	General Electric Cablevision	287,000
17.	Heritage Communications	238,451
18.	Comcast Corporation	212,677
19.	Liberty Communications	208,298 (9/81)
20.	Cablevision Systems Development	206,000 (9/81)

Note: Subscriber counts are as of December 1981 unless otherwise noted.
* includes NewChannels, MetroVision, and VisionCable
** includes 40 percent ownership in Nor-Cal Cable

Top 20 cable systems

Rank	Location	Operator	Subscribers
1.	San Diego, CA	Cox Cable	210,590
2.	Oyster Bay (Long Island), NY	Cablevision Systems	140,000 (9/81)
3.	Manhattan, NY	ATC	128,350 (6/81)
4.	West Orange, NJ	Maclean Hunter	114,626 (8/81)
5.	Los Angeles, CA	Teleprompter	103,500
6.	Wayne, NJ	UA-Columbia	100,365
7.	Tulsa, OK	United Cable	96,668
8.	Erie County, NY	Prime Cable	92,778
9.	Austin, TX	ATC	90,000 (9/81)
10.	San Jose, CA	Gill Industries	89,175
11.	San Antonio, TX	UA-Columbia	85,475
12.	Audubon, NJ	NYT Cable	84,610
13.	Tidewater, VA	Cox Cable	80,559
14.	Central Islip, NY	Viacom	80,291
15.	Manhattan, NY	Teleprompter	69,800
16.	Toledo, OH	Buckeye Cablevision	68,405
17.	Orlando, FL	ATC	68,350 (6/81)
18.	Wilmington, DE	Rollins Cablevision	68,038
19.	Grand Rapids, MI	General Electric Cablevision	67,900
20.	Seattle, WA	Teleprompter	67,100

Note: Subscriber counts are as of December 1981 unless otherwise noted.